



The following are instructions for making a transfer of marketable securities to The Miami Foundation. The marketable securities should be transferred electronically to the Foundation's account at JPMorgan Chase Bank, N.A. The transfer will be through DTC. The instructions are:

DTC Participant # 902 / JPMorgan Chase Bank, N.A.  
FFC to Account Number: P72500 for Account Number W93289002  
For Account of: THE MIAMI FOUNDATION INC – DCF  
Attn: Client Service 800-634-3763

**Please Note: All deliveries must include the Foundation's name and account number.**

**If the transfer involves mutual funds, a BIN # must be established. This should be coordinated closely with our team at JP Morgan and as much advance notice as possible should be given.**

Prior to the electronic transfer, please complete the attached **Donor of Stock/Securities Form** and send a copy to:

The Miami Foundation  
40 NW 3rd Street  
Suite 305  
Miami, FL 33128  
O: 305.371.2711  
E: [philanthropy@miamifoundation.org](mailto:philanthropy@miamifoundation.org)

Craig Williams  
Vice President, Senior Client Service Associate  
J.P. Morgan Private Bank  
500 Stanton Christiana Road  
Newark, DE 19713  
O: (800) 634-3763 | F: (855) 538-5804  
E: [florida\\_service3@jpmorgan.com](mailto:florida_service3@jpmorgan.com)

We recommend that you please contact The Miami Foundation prior to effecting the electronic transfer as our transfer instructions are subject to change.



40 NW 3rd Street  
Suite 305  
Miami, FL 33128-1838  
305.371.2711

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E: [florida\\_service3@jpmorgan.com](mailto:florida_service3@jpmorgan.com)

Dear Miami Foundation and Mr. Williams:

The following shares of stock were donated to The Miami Foundation:

Stock Name	Ticker	# of Shares	Donation Date

I certify that prior to donation to The Miami Foundation, Inc. the stock shares listed above were property of:

Legal Name of Donor: \_\_\_\_\_

Donor's Signature: \_\_\_\_\_

Broker/Institution making delivery w/DTC#: \_\_\_\_\_

Charitable Fund to Receive Contribution: \_\_\_\_\_

